



FORRESTER®



Department for
**Innovation,
Universities &
Skills**

How are young people using social media?

Analysis commissioned by DIUS from Forrester's European Technographics study

Steph Gray
DIUS Social Media

Rebecca Jennings
Forrester Research

September 2008



Technographics survey: July 2008

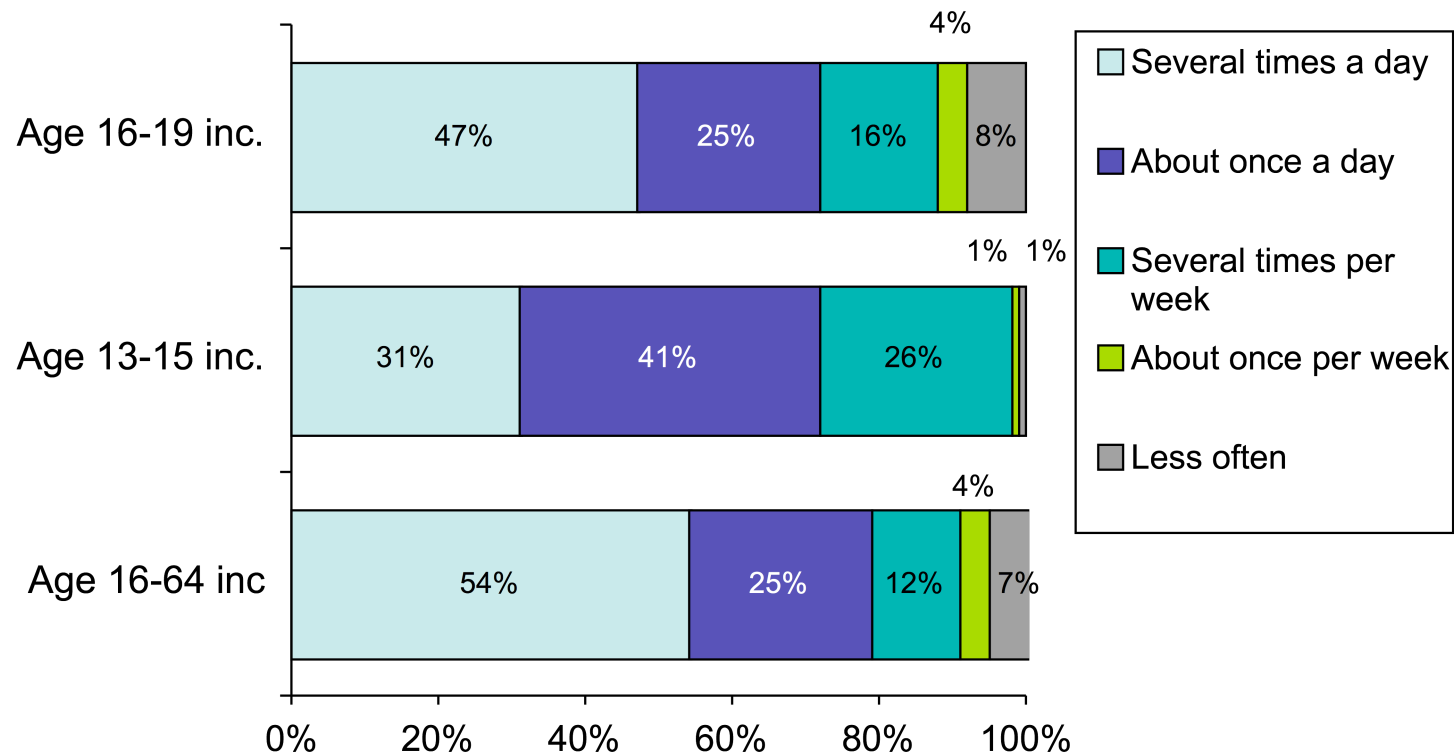
- 14,193 respondents across Europe, of which 2,006 in the UK
- This survey is based on **online** consumers who are members of Ipsos-MORI online panel
- Ipsos weighted the data by age, sex and online tenure to demographically represent the online adult European population per country
- Ipsos fielded the survey in July 2008 and motivated respondents with various incentives
- Confidence interval of around + or - 3% when the data is analyzed at UK level

Question areas

- How **often** you use the internet
- How **many hours** are you actively online each week
- Where you go online **from**
- What **else** you're doing while you're online
- What kind of online **activities** do you do
 - Putting your own **opinions, videos, music and photos** online
 - **Contributing to, organising or “tagging”** content on websites
 - Consuming content, including **social content**, on websites
- How often you visit **social networking sites**
- **Main** social networking site
- What you **did** the last few times you visited
- **Attitudes** towards social networking sites
- **Attitudes** towards virtual worlds

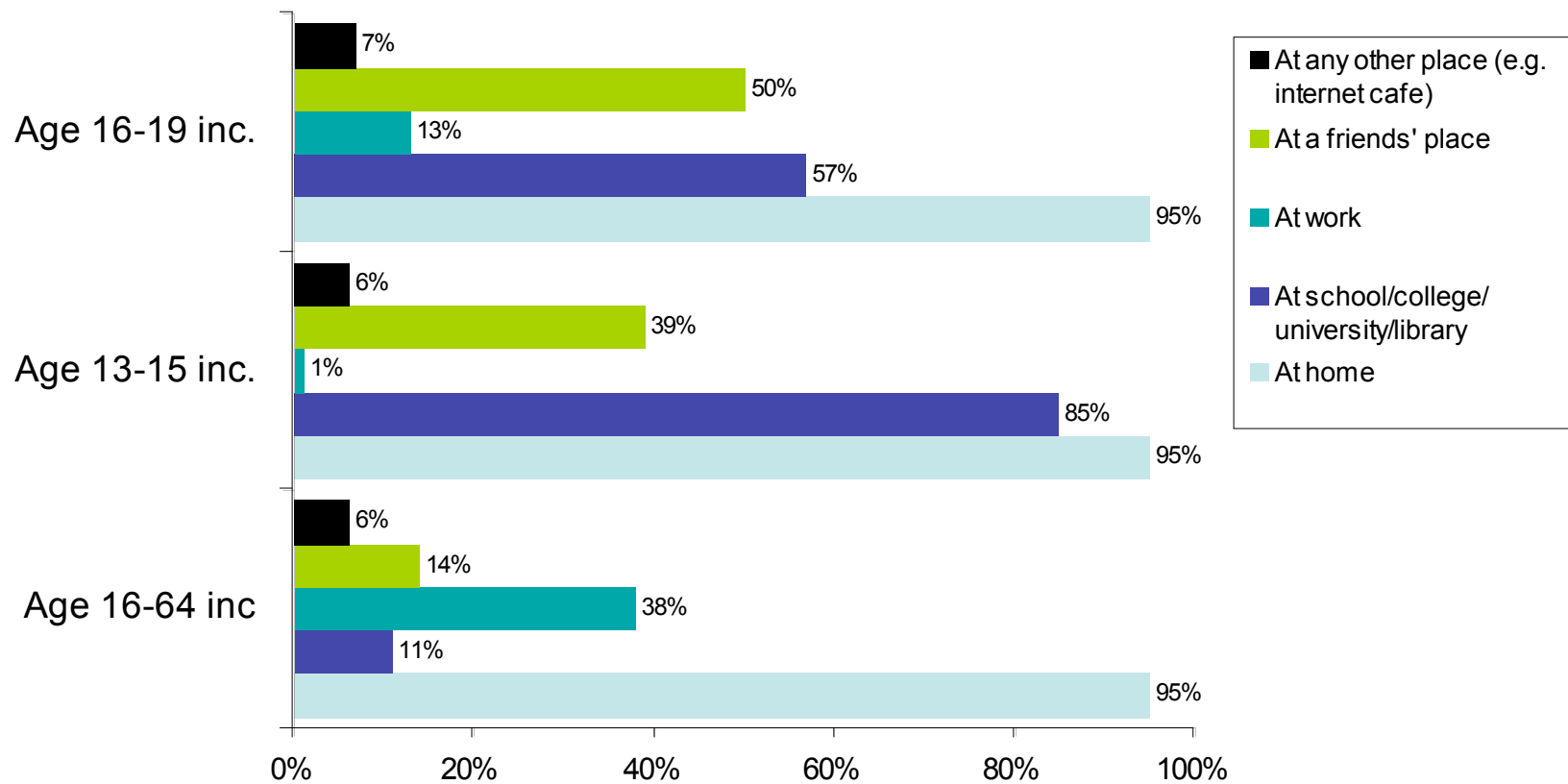
Most young people are online every day – but no more frequently than internet users generally

How often do you go online?



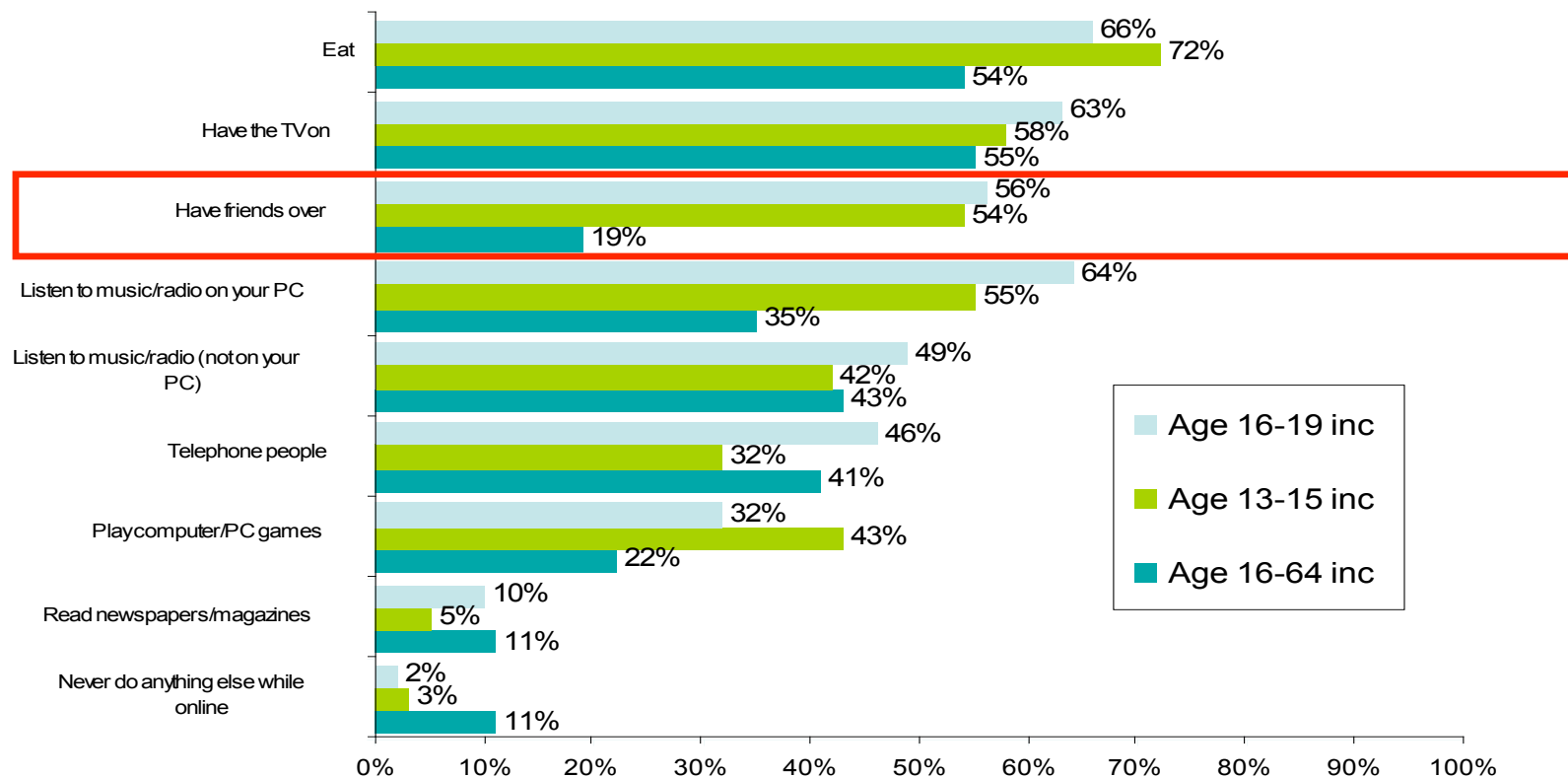
They go online from a greater variety of places

Go online at the following locations (multiple answers allowed)



For young people, internet use is a social activity

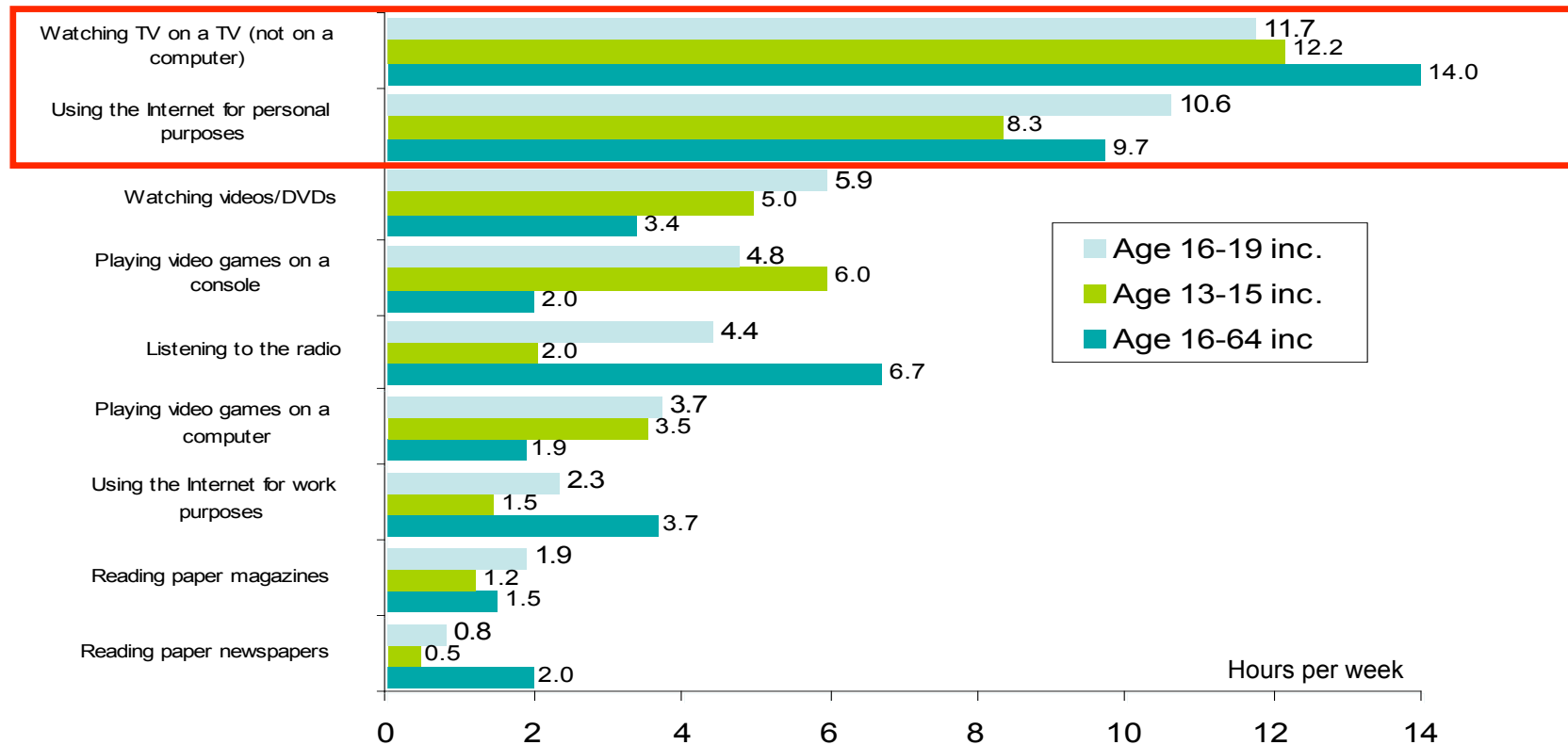
What do you do whilst using the internet/emailing at home?



Base: 154 13-15 year olds, 107 16-19 year olds, 1586 16-64 year olds
Source: Forrester Technographics Media and Marketing Study Q3 2008

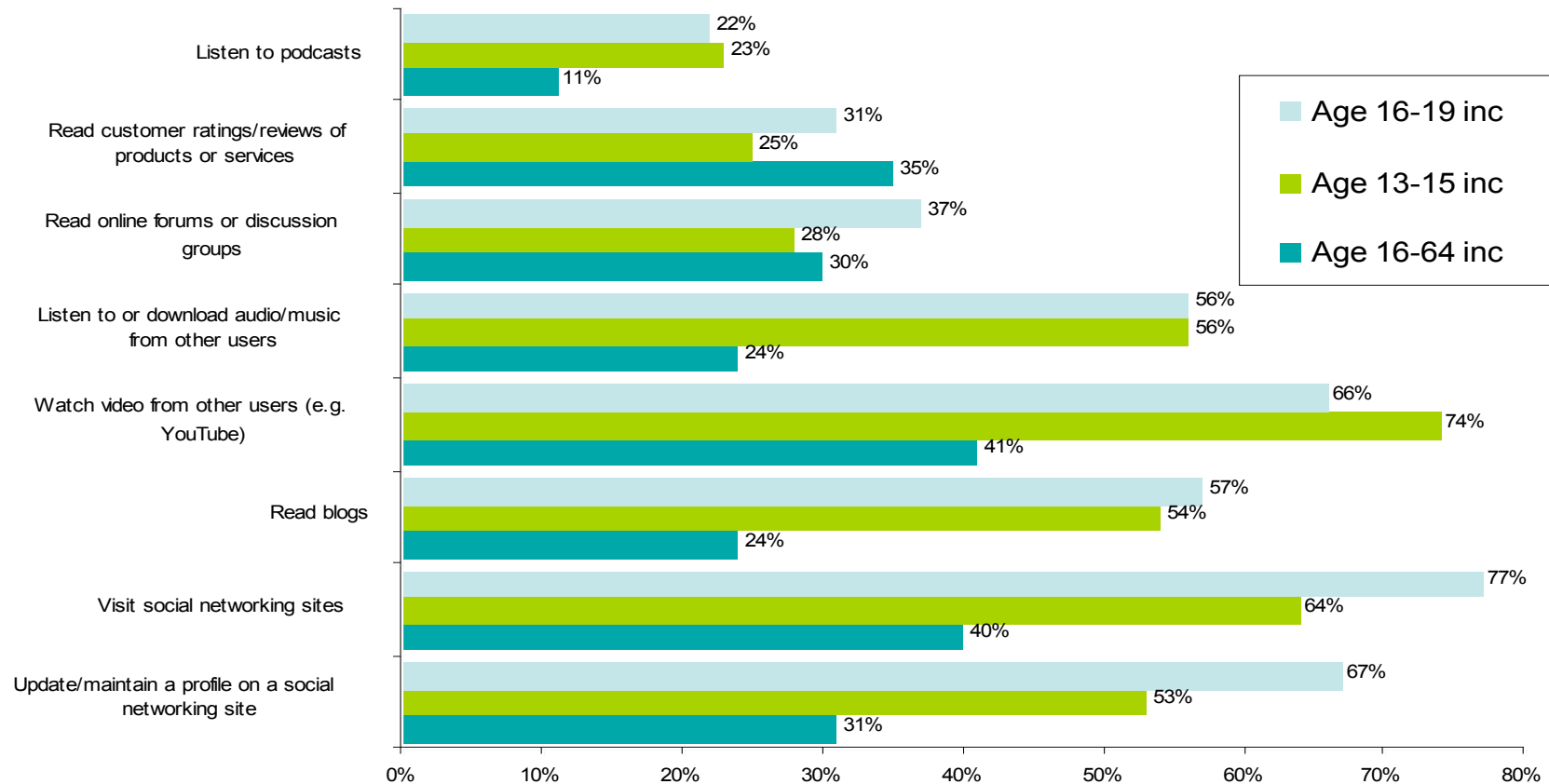
They watch less TV and surf more than adults: but TV still takes up more time

Hours per week spent:



Young people are far more likely to visit social network sites, or watch content from other users

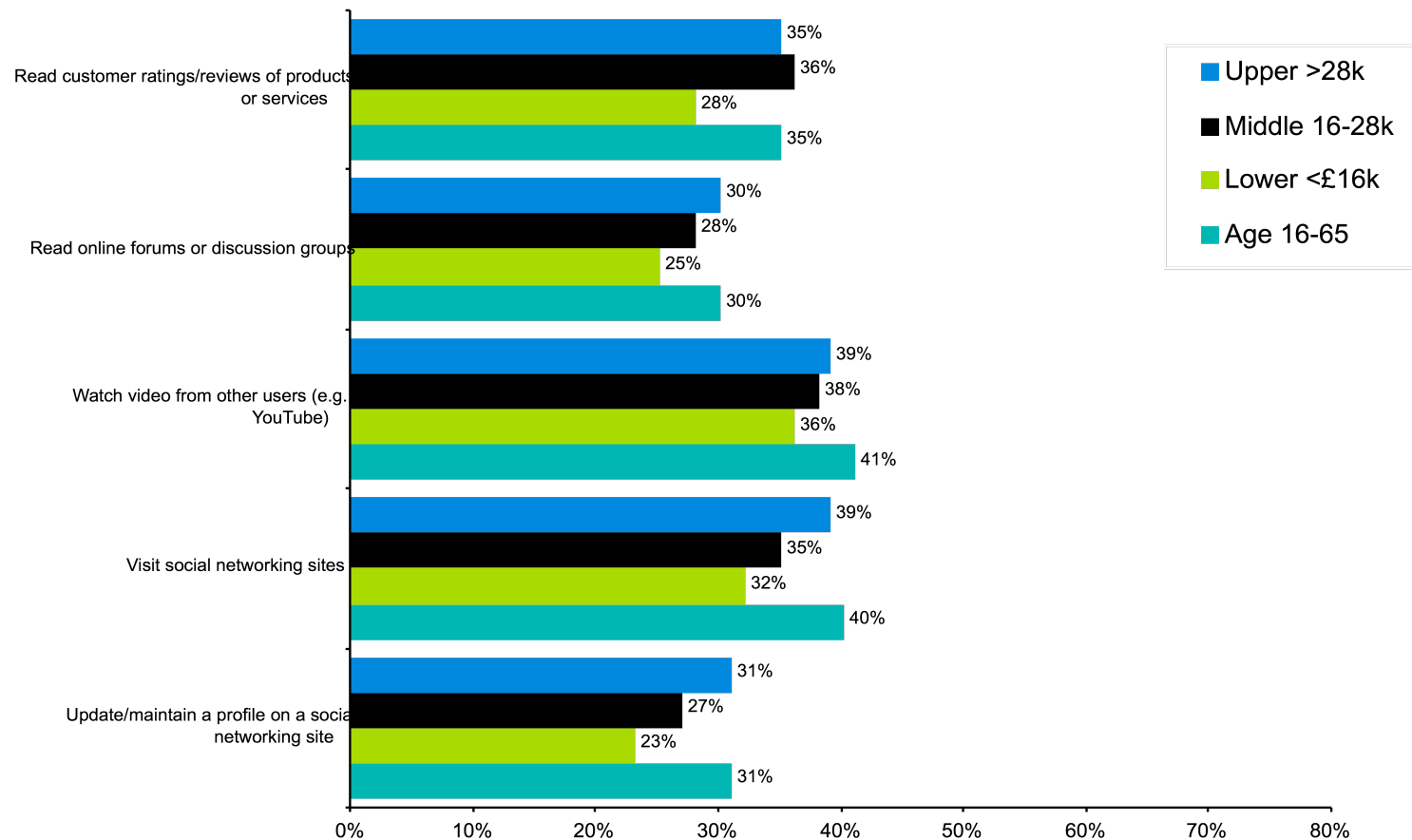
Frequency of visiting/consuming social content (at least monthly):



Income/social grade doesn't seem to be a key influencer when it comes to social media

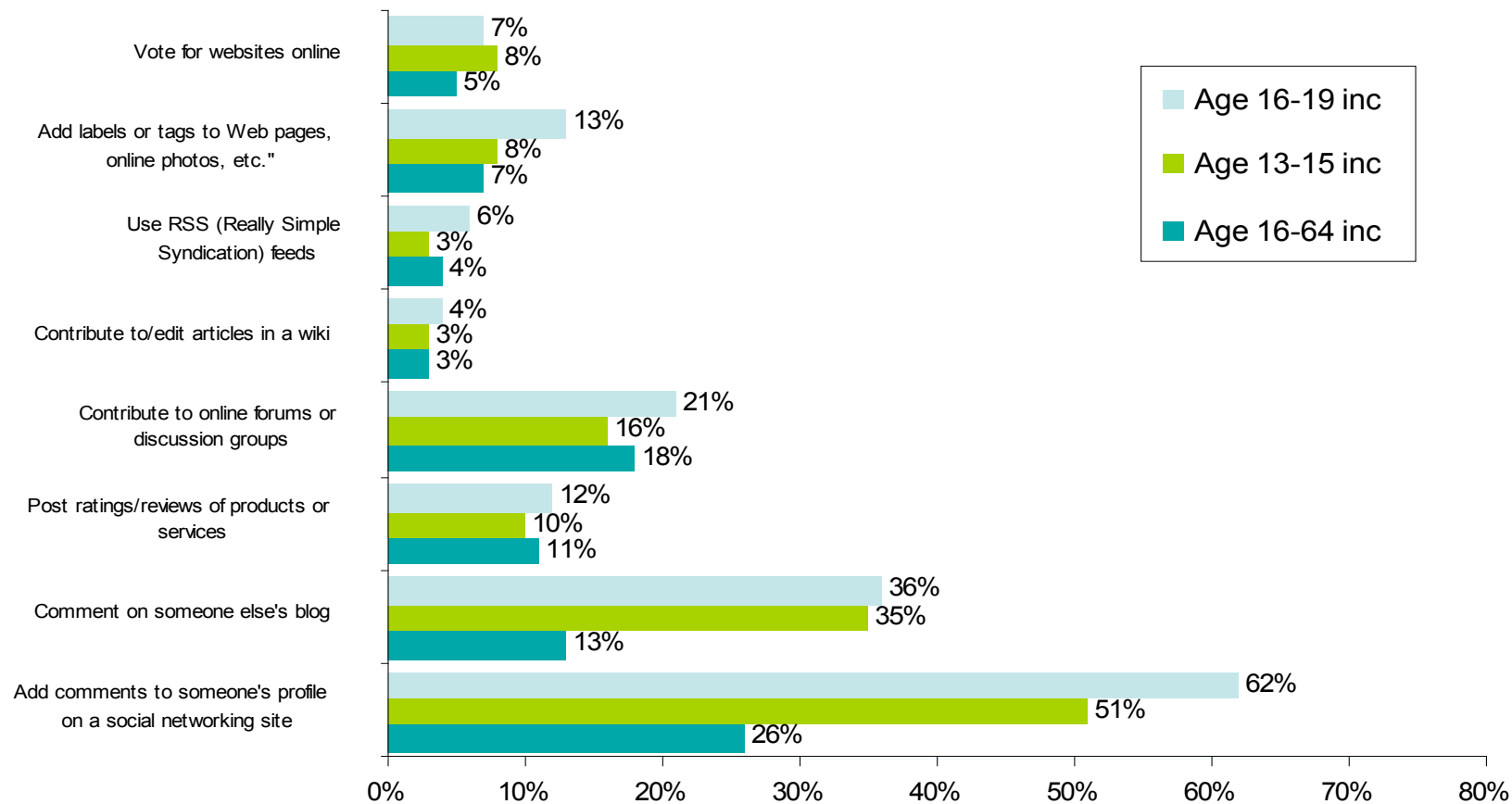
Frequency of visiting/consuming social content (at least monthly):

Department for
**Innovation,
Universities &
Skills**



Commenting more popular than editing wikis, using RSS or taking part in forums

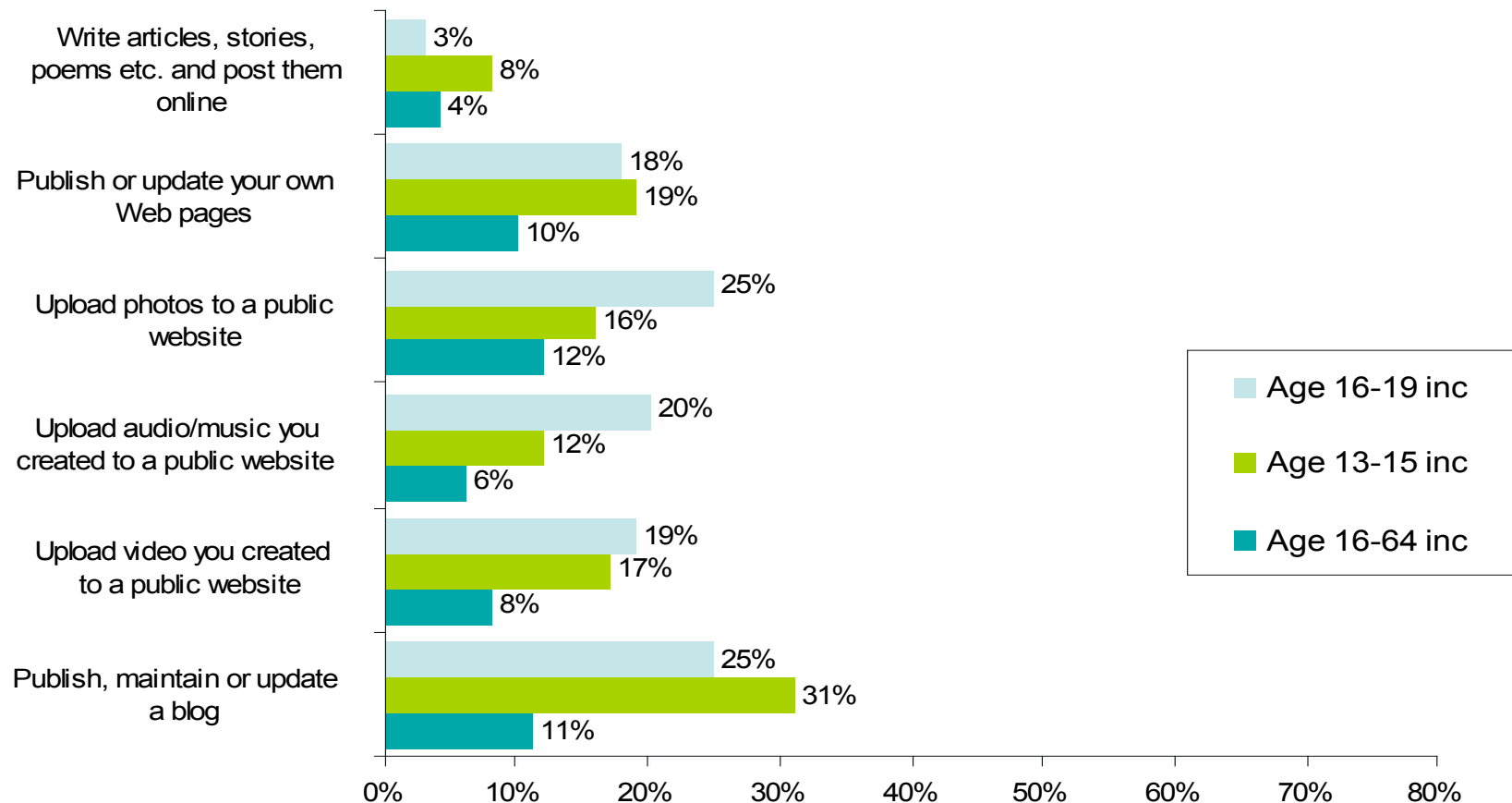
Frequency of contributing to social content (at least monthly)



Base: 154 13-15 year olds, 107 16-19 year olds, 1586 16-64 year olds
Source: Forrester Technographics Media and Marketing Study Q3 2008

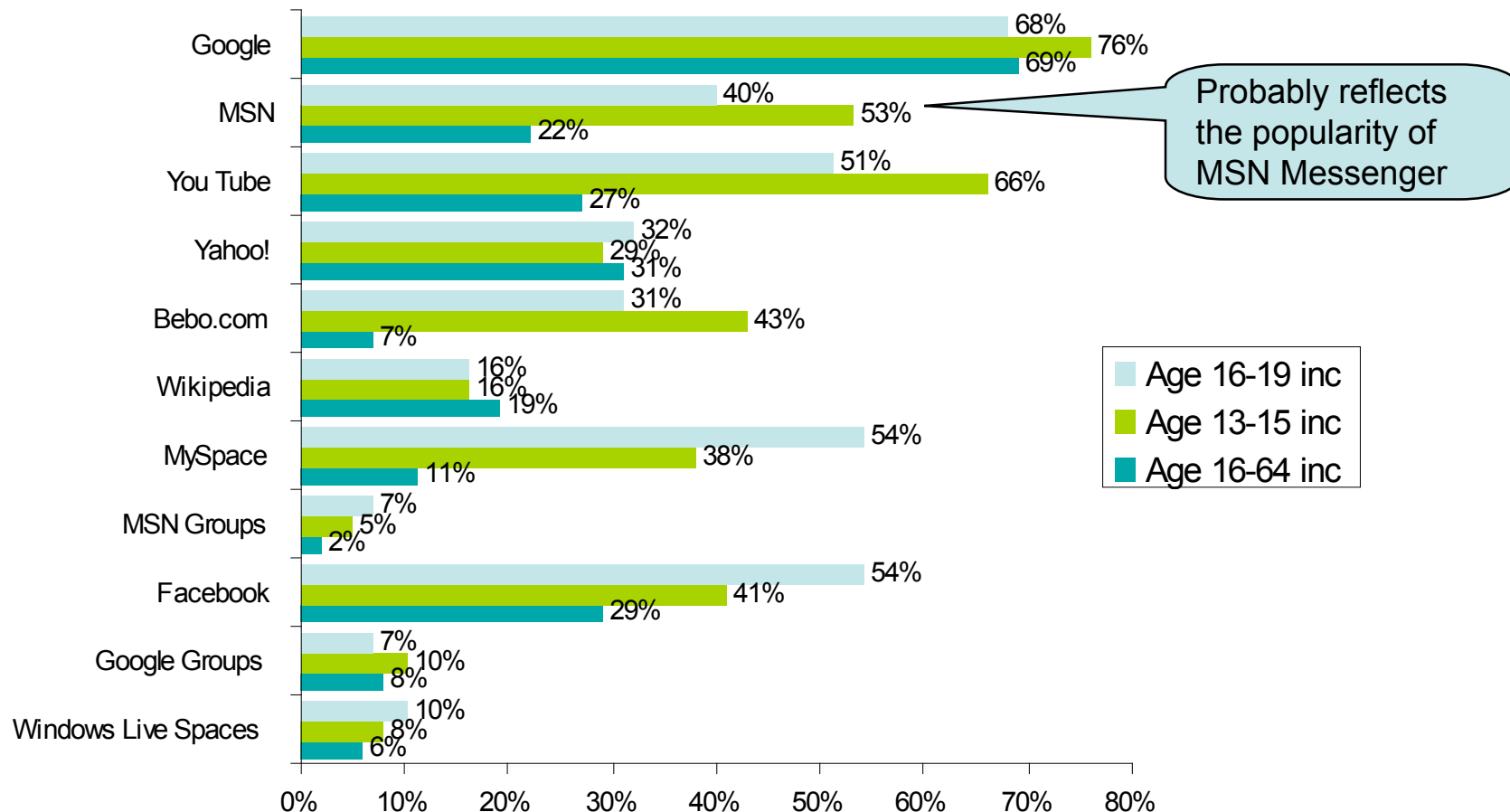
One in four young people are bloggers, and rising

Frequency of putting own opinions/content on the internet (at least monthly)



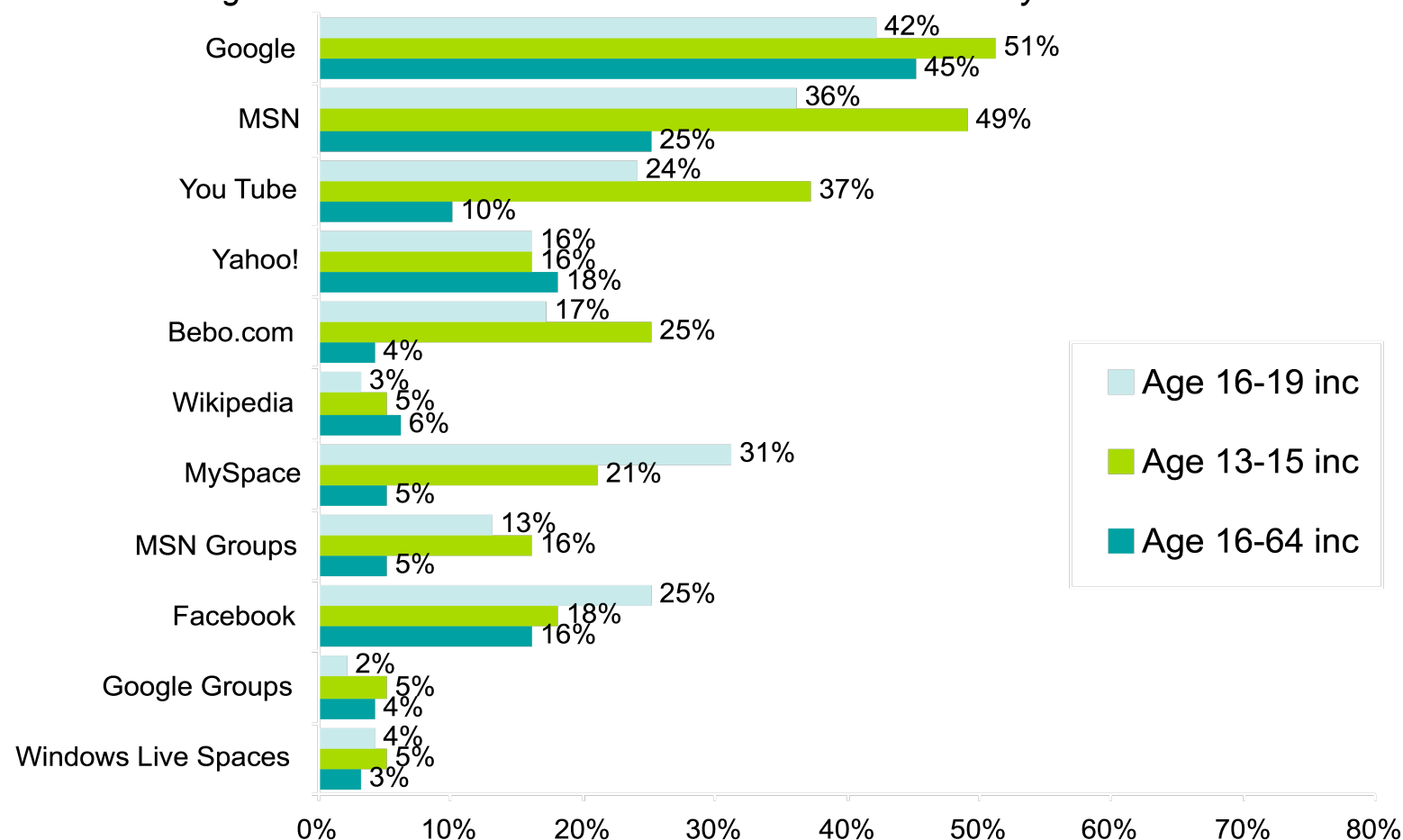
Usage of IM, YouTube and main social networking sites is particularly high amongst young people

Percentage of consumers who use these sites on a least a weekly basis



Social networking is a daily habit for at least a quarter of young people

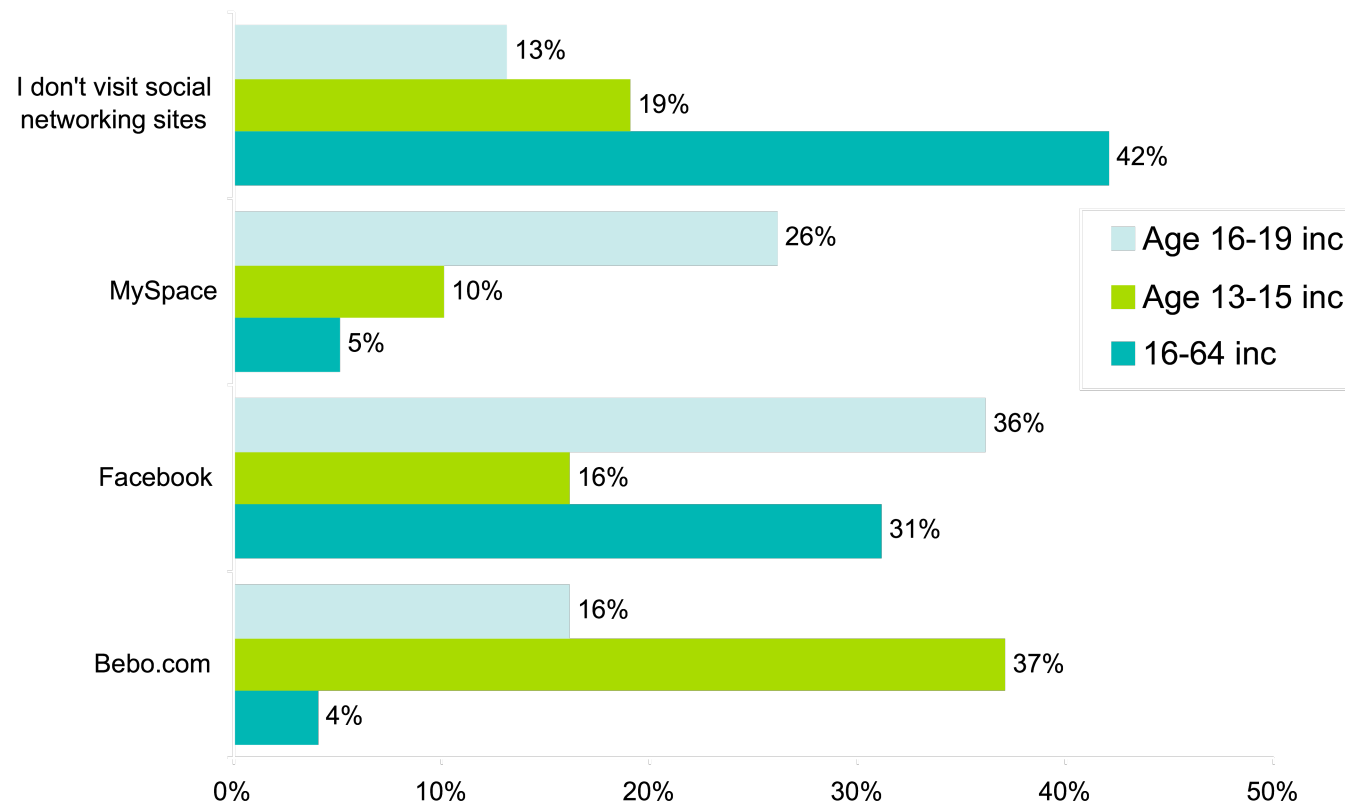
Percentage of consumers who use these sites on a least a daily basis



Base: 154 13-15 year olds, 107 16-19 year olds, 1586 16-64 year olds
Source: Forrester Technographics Media and Marketing Study Q3 2008

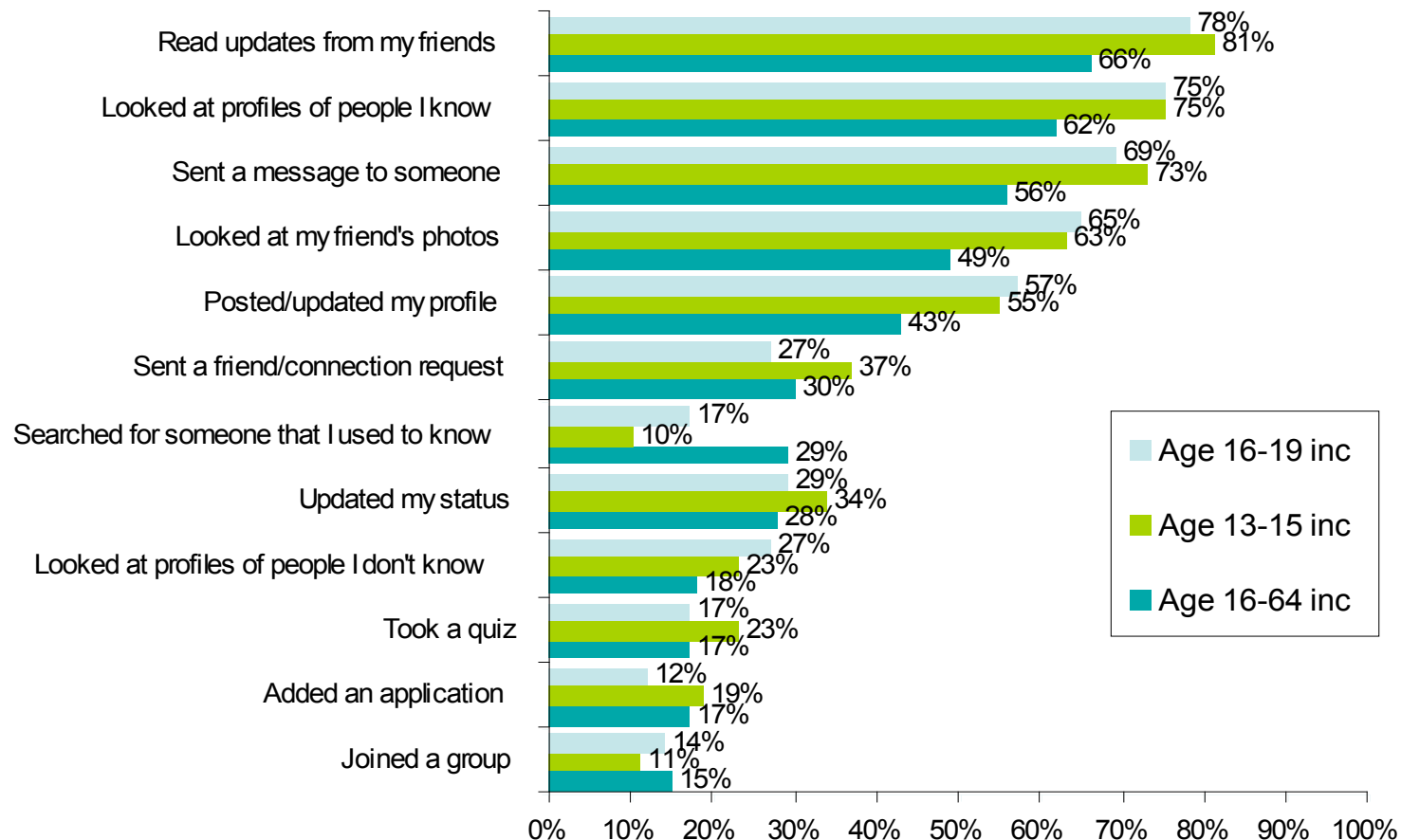
Bebo dominates amongst early teens, though loses ground to Facebook and MySpace as they get older

Which is your main networking site?



How young people use social networking sites is similar to everyone else - perhaps more 'social'?

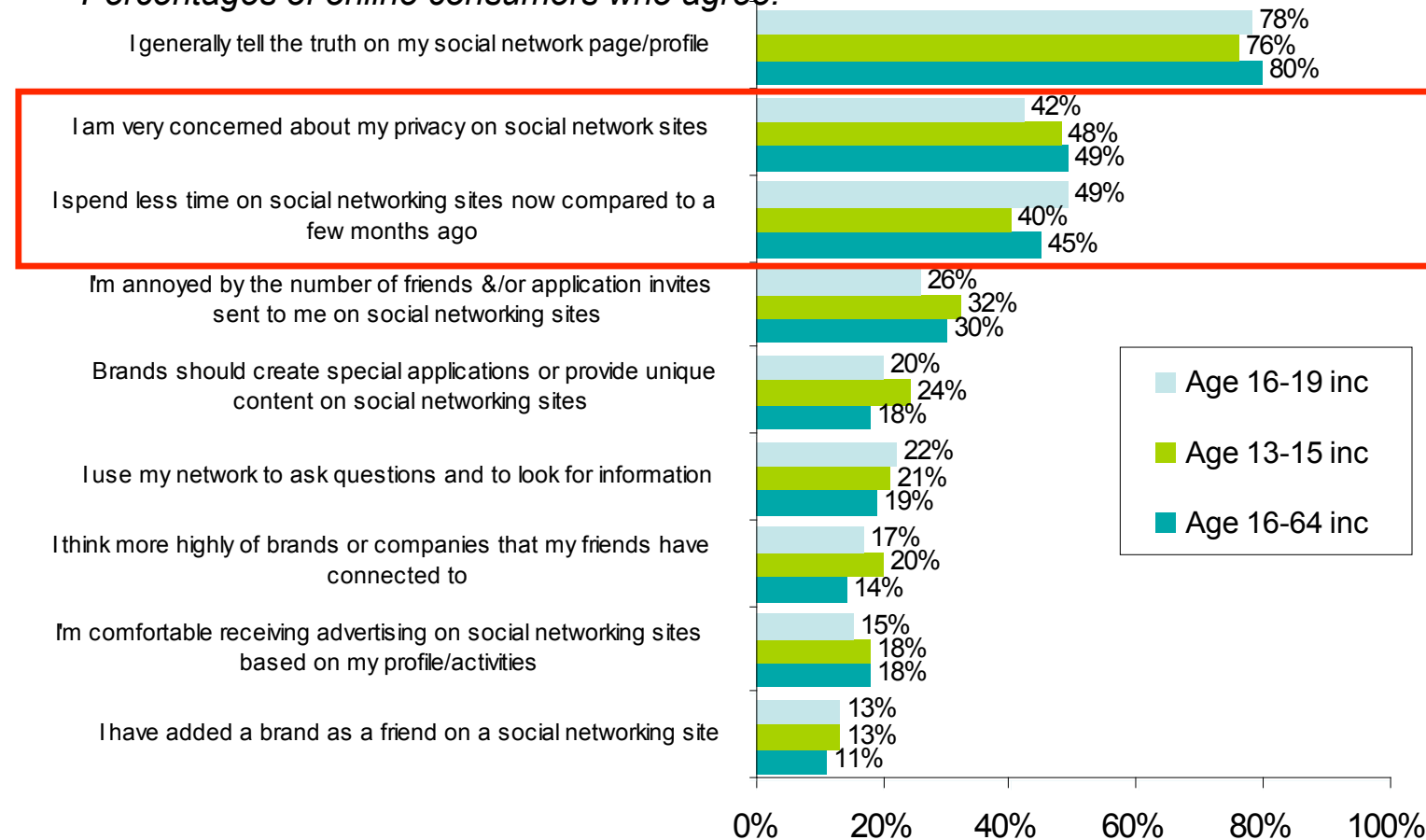
Done on last visit to social networking site



Base: 124 13-15 year olds, 93 16-19 year olds, 920 16-64 year olds who visit social network sites
Source: Forrester Technographics Media and Marketing Study Q3 2008

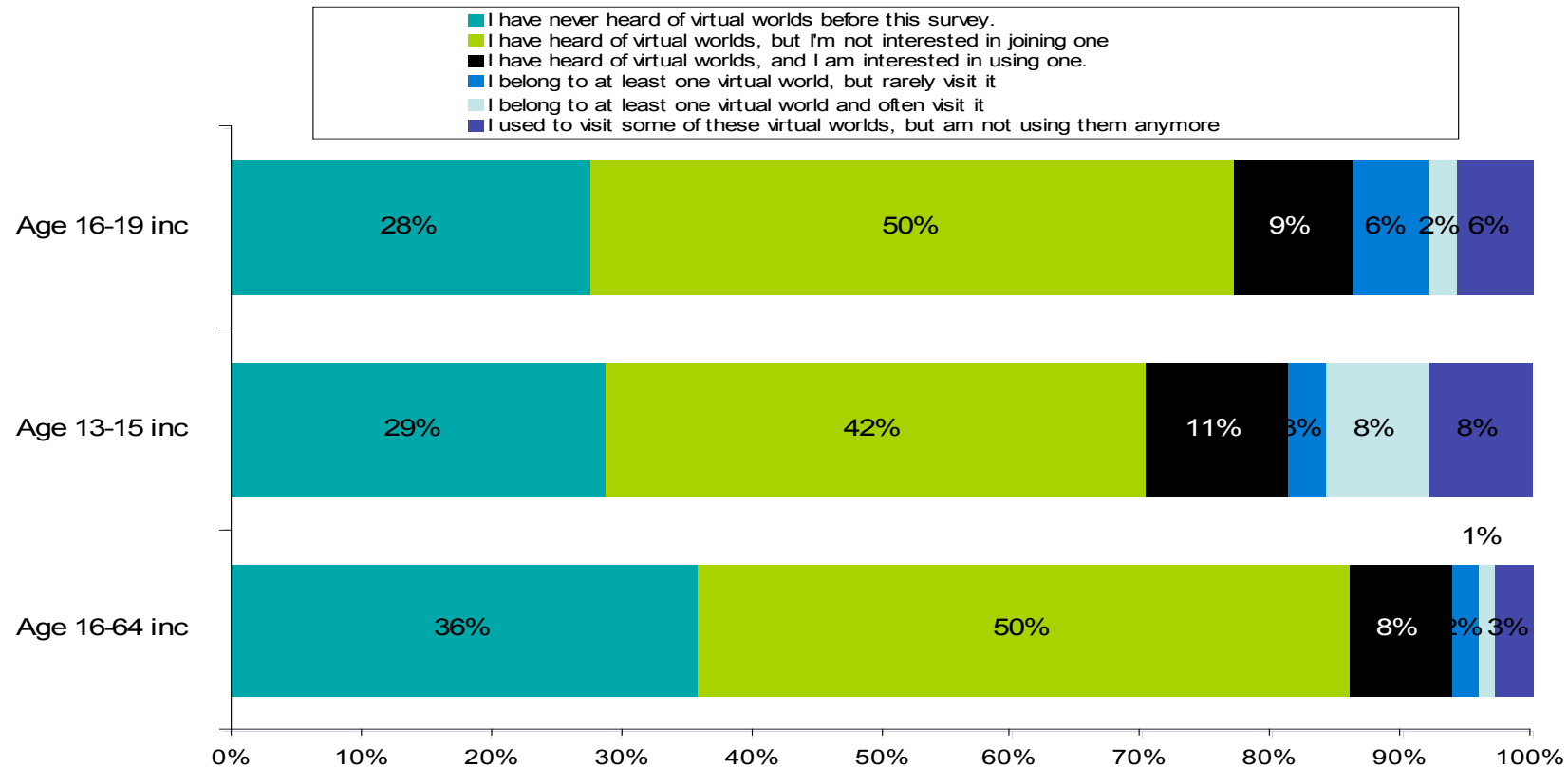
Attitudinally, young people feel virtually no different about social networks than others

Percentages of online consumers who agree:

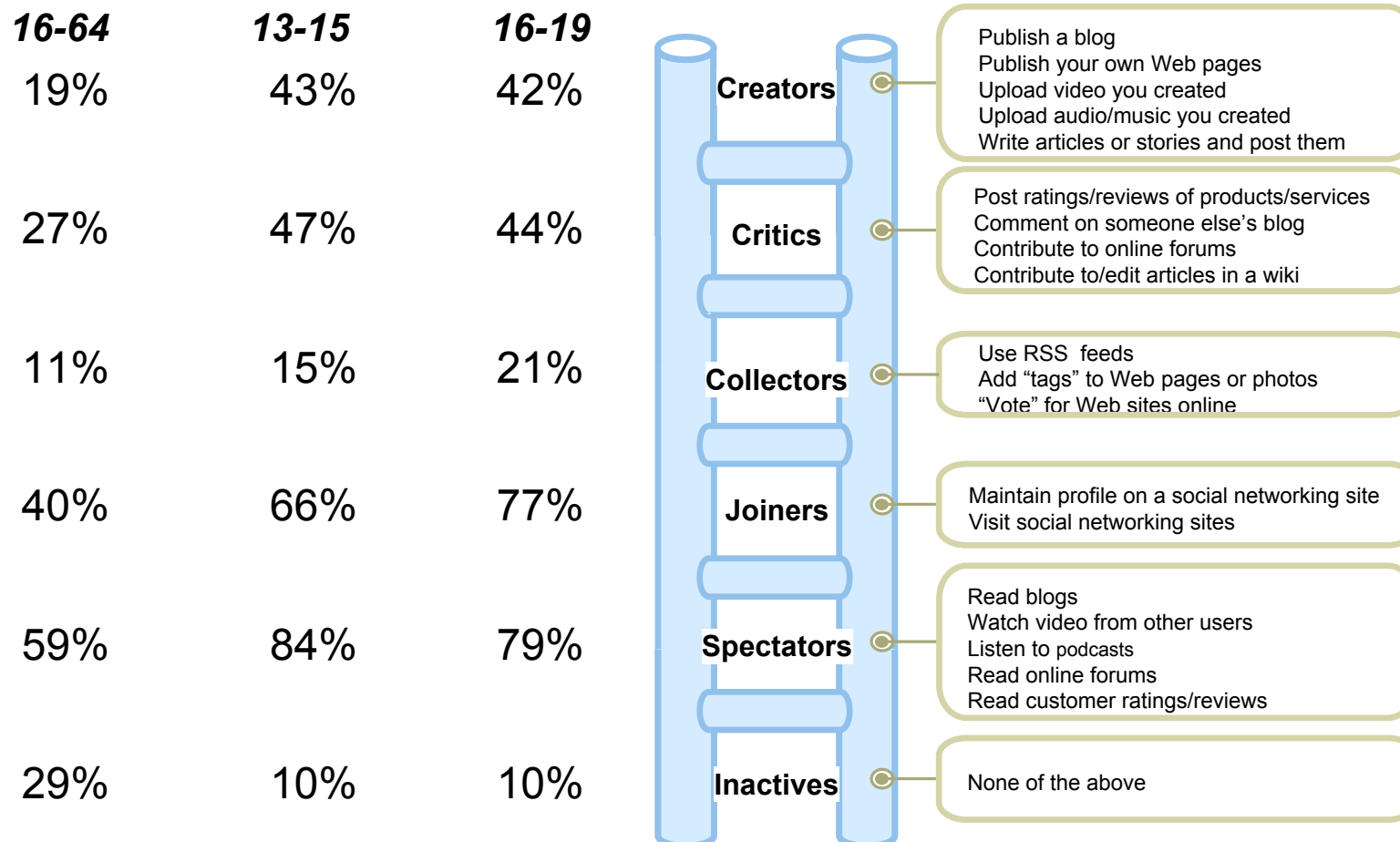


Few young consumers seem interested in virtual worlds (but do they know what they are?)

“A virtual world is a computer-based simulated environment intended for its users to inhabit and interact via virtual reality. This type of virtual world is now most common in massively multiplayer online games (e.g. Second Life). Have you ever heard of virtual worlds?”



Engagement with social media is high amongst young people



Groups include people participating in at least one of the activities monthly.

Summary (i)

- Going online is a social experience, not just a solitary one
- Young people watch less TV and listen to less radio than general online population, watching DVDs, playing video games, and surfing instead
- Much bigger users of multimedia content online: podcasts, music, video
- Every day, half of younger teens use IM, a third visit YouTube and a quarter use social networking sites

Summary (ii)

- Young people read blogs and use social networking much more than average internet users - and nearly one in three are active bloggers
- But they aren't social media geeks: they comment on things, but very few use RSS, wikis, tagging - or virtual worlds
- Maybe because they are less prolific consumers, reviews and ratings are a lower priority for young people
- Bebo is the leading network for younger teens; Facebook/MySpace for older
- But nearly half say they're spending less time social networking online than before, and a similar proportion are very concerned about privacy - in line with what other internet users say

Challenges and implications

- If young people surf with friends, what does that mean for the online experiences we design for them?
- As media consumption fragments, what will integrated marketing campaigns aimed at engaging young people look like in future?
- Where are the appropriate online spaces to engage young people with public service messages?
- How do we learn from talented young bloggers and commenters?
- How much tech savvy can we assume young people have?
- How we do address the privacy concerns of young people?